

IRS Data Retrieval Tool

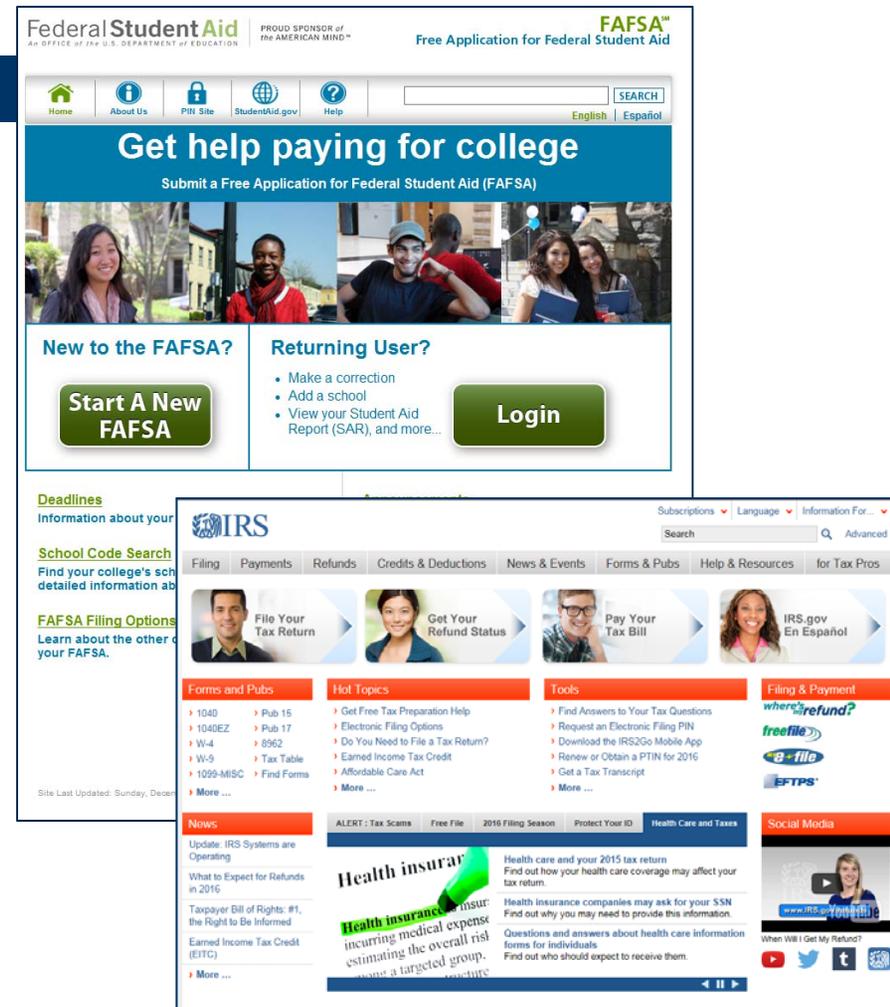
2016-2017 FAFSA



Financial Aid Office
University of California, San Diego

What is the IRS Data Retrieval Tool?

- The IRS Retrieval Tool gives FAFSA applicants and parents the ability to transfer their data from the IRS to the FAFSA
- The Retrieval Tool saves time and increases the accuracy of FAFSA information
- Applicants selected for Verification are encouraged to use the tool to update their FAFSA data as well



Eligibility

Students/Parents eligible to use the IRS Retrieval Tool:

- Must have valid SSN
- Must have filed a 2015 Federal Tax Return
- Date of filed Tax Return is:
 - More than 2 weeks if electronic
 - More than 8 weeks if by mail
- Must have an FSA ID Username and Password
- Marital status has not changed since December 31, 2015

Students/Parents NOT eligible to use the IRS Retrieval Tool:

- Filed an amended 2015 Federal Tax Return
- Not filing a 2015 Federal Tax Return
- Taxes filed recently
 - Less than 2 weeks if electronic
 - Less than 8 weeks if by mail
- Filing status is Married Filing Separately
- Filing status is Unmarried but both parents living together
- Filing status is Head of Household and marital status is married
- Filed a Puerto Rican or foreign tax return

Where to Start:

- Log on to: www.fafsa.ed.gov
- Select [Start A New FAFSA](#) if this is your first time completing this application
- Select [Login](#) if you have completed this application in the past
- Once logged in, the Data Retrieval Tool will be found under [Financial Information](#)



The screenshot shows the Federal Student Aid (FAFSA) website homepage. At the top, it features the logo for Federal Student Aid, an office of the U.S. Department of Education, and the FAFSA logo. Below the logo is a navigation bar with icons for Home, About Us, PIN Site, StudentAid.gov, and Help. A search bar is located on the right side of the navigation bar. The main heading reads "Get help paying for college" and "Submit a Free Application for Federal Student Aid (FAFSA)". Below the heading is a photograph of four diverse students. The page is divided into two columns: "New to the FAFSA?" and "Returning User?". The "New to the FAFSA?" column has a green button labeled "Start A New FAFSA". The "Returning User?" column has a list of options: "Make a correction", "Add a school", and "View your Student Aid Report (SAR), and more...", followed by a green button labeled "Login".

Parent Tax Information

- Parents will select their 2015 tax return filing status
 - Already Completed
 - Will File
 - Not Going to File

The screenshot shows the FAFSA application interface. At the top, it says "Federal Student Aid" and "FAFSA® Free Application for Federal Student Aid". Below this is a navigation bar with tabs for "Student Demographics", "School Selection", "Dependency Status", "Parent Demographics", "Financial Information", "Sign & Submit", and "Confirmation". The "Parent Demographics" tab is selected. The main content area is titled "Parent Tax Information" and contains a message: "Application was successfully saved." Below this is a question: "For 2015, have your parents completed their IRS income tax return or another tax return?" with a dropdown menu showing "Select". There are "PREVIOUS" and "NEXT" buttons. At the bottom of the form are buttons for "NEED HELP?", "SAVE", "CLEAR ALL DATA", "VIEW FAFSA SUMMARY", and "EXIT". On the right side, there is a "Help and Hints" section for "Question 80" titled "Parents Filed 2015 Income Tax Return?". The help text explains that the question asks whether parents have filed or will file a 2015 income tax return, and provides instructions for how to answer based on marital status. A dropdown menu at the bottom of the help section shows "Already completed".

Parent Tax Information

- Parents will select tax filing marital status
- These options determine whether parents are eligible to use the IRS Retrieval Tool
- Refer to slide 3 to see which marital statuses are not eligible for IRS Data Retrieval.
- Select NEXT

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

PROUD SPONSOR of
the AMERICAN MIND®

FAFSA®
Free Application for Federal Student Aid

Help

SEARCH

Student Demographics | School Selection | Dependency Status | **Parent Demographics** | Financial Information | Sign & Submit | Confirmation

Parent Tax Information

Application was successfully saved.

For 2015, have your parents completed their IRS income tax return or another tax return?
Already completed ▾

For 2015, what is your parents' tax filing status according to their tax return?
Select ▾

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

PARENT

Select
Single
Head of Household
Married-Filed Joint Return
Married-Filed Separate Return
Qualifying Widow(er)
Don't know

Help and Hints

Parent's 2015 Tax Return Filing Status Question 82

If your parents filed or will file a tax return, you must select your parents' tax return filing status for 2015:

- Single
- Head of Household
- Married-Filed Joint Return
- Married-Filed Separate Return
- Qualifying Widow(er)
- Don't know

If your parents filed a 1040 or 1040A tax return, select the tax return filing status from the "Filing Status" field of your parents' tax return.

If your parents filed a 1040EZ tax return, select **Single** if your parents are

Parent Tax Information

Note:

•If marital status was answered “Unmarried and both parents are living together” on question 59, the marital filing status question will not appear under Financial Information.

•IRS Data retrieval is not an option

•Select NEXT and continue completing FAFSA

Student Demographics School Selection Dependency Status **Parent Demographics** Financial Information Sign & Submit Confirmation

Parent Demographics Information

Application was successfully saved.

As of today, what is the marital status of your legal [parents](#) (biological and/or adoptive)?
Unmarried and both parents living together

What is your Parent 1 (father's/mother's) Social Security Number?

What is your Parent 1 (father's/mother's) last name?

What is your Parent 1 (father's/mother's) first initial?

What is your Parent 1 (father's/mother's) date of birth? (mmddyyyy)

What is your Parent 2 (father's/mother's) Social Security Number?

What is your Parent 2 (father's/mother's) last name?

What is your Parent 2 (father's/mother's) first initial?

What is your Parent 2 (father's/mother's) date of birth? (mmddyyyy)

Your parents' e-mail address

Help and Hints

Parents' Marital Status Question 59

You must select the answer that describes your [parents'](#) marital status **as of today**.

[More>>>](#)

PARENT

Parent Tax Information

•If Parent marital status is eligible for IRS Data Retrieval, the following 3 questions must be answered **NO** in order to LINK TO IRS

•If any are answered **YES**, the IRS Data Retrieval is not an option.

•Select NEXT Continue filing out FAFSA

P
A
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E
N
T

Parent Tax Information

For 2015, have your parents completed their IRS income tax return or another tax return?
Already completed ▾

For 2015, what is your parents' tax filing status according to their tax return?
Married-Filed Joint Return ▾

To determine if you, the parents, can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into the FAFSA, answer the following question(s):

Did you, the parents, file a Form 1040X amended tax return?
 Yes No

Did you, the parents, file a Puerto Rican or foreign tax return?
 Yes No

Did you, the parents, file taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?
 Yes No

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

Which parent are you?
Select ▾

What is your (the parent's) FSA ID?

FSA ID Username or Verified E-mail Address

FSA ID Password

[Create an FSA ID](#)
[Forgot Username](#)
[Forgot Password](#)

LINK TO IRS

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints

Recently Filed Taxes?

If you, the parent(s), filed your taxes electronically within the last 3 weeks, or by mail within the last 11 weeks, select **Yes**; otherwise, select **No**.

If you filed your taxes within either of those timeframes, then your tax return information might not be available from the IRS. You can attempt to use the [IRS Data Retrieval Tool](#); however, if you are not able to transfer your tax return information into your FAFSA at this time, you can try again in a week or two or you can manually enter your tax return information.

Parent Tax Information

- Selected parent should have an existing FAFSA FSA ID
 - If neither one has an existing FSA ID, select Create an FSA ID
- Enter parent Username and Password
- Select LINK TO IRS
- You will be leaving the FAFSA website, but all entered information will be saved
- Select OK

Based on your response, we recommend that you, the parents, transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

Which parent are you?

What is your (the parent's) FSA ID?

FSA ID Username or Verified E-mail Address

FSA ID Password

[Create an FSA ID](#)
[Forgot Username](#)
[Forgot Password](#)

LINK TO IRS

Leaving FAFSA on the Web

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. Your information will be saved and your *FAFSA on the Web* session will end.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA.

Click **OK** to continue. Otherwise, click **Cancel**.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

CANCEL **OK**

Tax Retrieval IRS.gov

- Parent will fill in their information
- Be sure all information is entered as it appears on the 2015 Tax Return
- Select Submit

 [Return to FAFSA](#) | [Log Out](#) | [Help](#)

[Español](#)

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2015 Federal Income Tax Return. [?](#) Required fields *

First Name *	Mother
Last Name *	Smith
Social Security Number *	*** - ** - 6053
Date of Birth *	06 / 31 / 1956
Filing Status * ?	Married-Filed Joint Return <input type="button" value="v"/>
Address - Must match your 2014 Federal Income Tax Return. ?	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) ?	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States <input type="button" value="v"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One <input type="button" value="v"/>
ZIP Code *	<input type="text"/>

Select the button below to exit the IRS system and return to your FAFSA. By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

[IRS Privacy Policy](#)

Tax Retrieval IRS.gov

•Review tax information for accuracy

•Check first box to transfer tax information into FAFSA

•Select Transfer Now

Return to FAFSA | Log Out | Help

Español

Parent 2015 Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers ?
Tax Year	2015	
Name(s)	Copper C Dog	
Social Security Number	*** - ** - 8046	
Filing Status	Head of Household	
Type of Tax Return Filed	1040	Question 81 on the FAFSA
Adjusted Gross Income	\$11,000	Question 85 on the FAFSA
Income Earned From Work ?	\$10,000	Mother: Question 88 on the FAFSA or Father: Question 89 on the FAFSA
Income Tax	\$2,200	Question 86 on the FAFSA
IRS Exemptions	1	Question 87 on the FAFSA
Education Credits	\$0	Question 93a on the FAFSA
IRA Deductions and Payments	\$0	Question 94b on the FAFSA
Tax-Exempt Interest Income	\$200	Question 94d on the FAFSA
Untaxed IRA Distributions ?	\$0	Question 94e on the FAFSA
Untaxed Pensions ?	\$0	Question 94f on the FAFSA

Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA ?

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information. [Transfer Now ?](#)

Do Not Transfer My Tax Information and Return to the FAFSA ?

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA. [Do Not Transfer ?](#)

Parent Tax Information



- IRS data is now transferred to FAFSA

- DO NOT make changes to any of the financial information retrieved

- Select NEXT and continue to Student Financial Information



■ You have successfully transferred your 2015 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS."

Student Tax Information

•Student will select 2015 tax return filing status

- Already Completed
- Will File
- Not Going to File

•Select NEXT

The screenshot displays the Federal Student Aid application interface. At the top, it features the 'Federal Student Aid' logo, the text 'An OFFICE of the U.S. DEPARTMENT of EDUCATION', and the 'PROUD SPONSOR of the AMERICAN MIND®' logo. To the right, it says 'Free Application for Federal Student Aid' and 'FAFSA®'. Below the header is a search bar with a 'SEARCH' button and a 'Help' icon. A navigation bar contains tabs for 'Student Demographics', 'School Selection', 'Dependency Status', 'Parent Demographics', 'Financial Information', 'Sign & Submit', and 'Confirmation'. The 'Student Demographics' tab is active, and the 'Student Tax Information' section is highlighted. The main content area asks, 'For 2015, have you completed your IRS income tax return or another tax return?' with a dropdown menu set to 'Select'. Below this are 'PREVIOUS' and 'NEXT' buttons. At the bottom of the section are buttons for 'NEED HELP?', 'SAVE', 'CLEAR ALL DATA', 'VIEW FAFSA SUMMARY', and 'EXIT'. On the left side of the interface, the word 'STUDENT' is written vertically. On the right, a 'Help and Hints' sidebar is visible, titled 'Student Filed 2015 Income Tax Return? Question 32'. It provides instructions: 'You must select the answer that describes your tax filing status:' followed by a bulleted list: '• Already completed', '• Will file', and '• Not going to file'. Below the list, it explains that if a student indicates they will file a 2015 tax return and their 2015 income is similar to their 2014 income, they should use their 2014 income tax return for estimates. If not similar, they should click 'Income Estimator' for assistance. At the bottom of the page, it says 'Site Last Updated: Sunday, January 24, 2016' and 'Download Adobe Reader'. A 'Privacy' link is also present.

Student Tax Information

- Student will select tax filing marital status
- These options determine whether students are eligible to use the IRS Retrieval Tool
- Refer to slide 3 to see which marital statuses are not eligible for IRS Data Retrieval
- Dependent students will select Single
- Select NEXT

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Help [SEARCH]

Student Demographics | School Selection | Dependency Status | Parent Demographics | Financial Information | Sign & Submit | Confirmation

Student Tax Information

For 2015, have you completed your IRS income tax return or another tax return?
Already completed ▾

For 2015, what is your tax filing status according to your tax return?
Select ▾

PREVIOUS NEXT

NEED HELP? SAVE CLEAR ALL DATA VIEW FAFSA SUMMARY EXIT

Help and Hints
Student Filed 2015 Income Tax Return?
Question 32

You must select the answer that describes your tax filing status:

- Already completed
- Will file
- Not going to file

If you indicate you "Will file" a 2015 tax return and your 2015 income is similar to your 2014 income, use your 2014 income tax return to provide estimates for questions about your income. If your income is not similar, click **Income Estimator** for assistance estimating your adjusted gross income, and answer the remaining questions about your income to the

Site Last Updated: Sunday, January 24, 2016 | Download [Adobe Reader](#)
Privacy

Student Tax Information

•If student is eligible for IRS Data Retrieval, the following 3 questions must be answered **NO** in order to Link to IRS

•If any are answered **YES**, the IRS Data Retrieval is not an option

•Select NEXT Continue filing out FAFSA

Student Tax Information

For 2015, have you completed your IRS income tax return or another tax return?

Already completed ▼

For 2015, what is your tax filing status according to your tax return?

Single ▼



To determine if you can use the IRS Data Retrieval Tool to transfer your tax return information from the IRS into your FAFSA, **answer the following question(s)**:

Did you file a Form 1040X amended tax return?

Yes No

Did you file a Puerto Rican or foreign tax return?

Yes No

Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?

Yes No

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address

FSA ID Password

[Create an FSA ID](#)

LINK TO IRS

PREVIOUS

NEXT

NEED HELP?

SAVE

CLEAR ALL DATA

VIEW FAFSA SUMMARY

EXIT

Student Tax Information

- Student will enter existing FSA ID
 - If none exists, select Create an FSA ID
- Select LINK TO IRS
- You will be leaving the FAFSA website, but information will be saved
- Select OK

Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. [How you filed your taxes](#) can affect whether your tax return information is available to transfer.

Enter your FSA ID and click **Link To IRS**.

What is your (the student's) FSA ID?

FSA ID Username or Verified E-mail Address

[Create an FSA ID](#)

LINK TO IRS

FSA ID Password

Leaving FAFSA on the Web

You are now leaving *FAFSA on the Web* and will be transferred to the IRS Web site to access your IRS tax information. Your information will be saved and your *FAFSA on the Web* session will end.

Your saved FAFSA will automatically open either when you transfer your information from the IRS or choose to return to *FAFSA on the Web* from the IRS Web site. If you do not transfer your information or choose not to return to *FAFSA on the Web* from the IRS Web site, you will have to log in to open your saved FAFSA.

Click **OK** to continue. Otherwise, click **Cancel**.

If you have any questions or problems using this tool, view available [Help](#) options for assistance.

CANCEL

OK

Student Tax Information

- Student will fill in their information
- Be sure all information is entered as it appears on the 2015 Tax Return
- Select Submit

 [Return to FAFSA](#) | [Log Out](#) | [Help](#)
[Español](#)

Get My Federal Income Tax Information

See our [Privacy Notice](#) regarding our request for your personal information.

Enter the following information from your 2015 Federal Income Tax Return. [?](#) **Required fields ***

First Name *	<input type="text" value="Dependent"/>
Last Name *	<input type="text" value="Data"/>
Social Security Number *	*** - ** - 2581
Date of Birth *	01 / 01 / 1994
Filing Status * ?	Single <input type="text"/>
Address - Must match your 2015 Federal Income Tax Return. ?	
Street Address *	<input type="text"/>
P.O. Box (Required if entered on your tax return) ?	<input type="text"/>
Apt. Number (Required if entered on your tax return)	<input type="text"/>
Country *	United States <input type="text"/>
City, Town or Post Office *	<input type="text"/>
State/U.S. Territory *	Select One <input type="text"/>
ZIP Code *	<input type="text"/>

Select the button below to exit the IRS system and return to your FAFSA.

By submitting this information, you certify that you are the person identified. Use of this system to access another person's information may result in civil and criminal penalties.

Student Tax Information

- Review tax information for accuracy

- Check first box to transfer tax information into FAFSA

- Select Transfer Now


Return to FAFSA | Log Out | Help

[Español](#)

Student 2015 Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers ?
Tax Year	2015	
Name(s)	Dependent Data	
Social Security Number	*** - ** - 2581	
Filing Status	Single	Question 34 on the FAFSA
Type of Tax Return Filed	1040EZ	Question 33 on the FAFSA
Adjusted Gross Income	\$9,750	Question 36 on the FAFSA
Income Earned From Work ?	\$20,125	Question 39 on the FAFSA
Income Tax	\$7,025	Question 37 on the FAFSA
IRS Exemptions	5	Question 38 on the FAFSA

 Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA ?

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information. Transfer Now ?

Do Not Transfer My Tax Information and Return to the FAFSA ?

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA. Do Not Transfer ?

[IRS Privacy Policy](#)

Student Tax Information



- IRS data is now transferred to FAFSA

- DO NOT make changes to any of the financial information retrieved



■ You have successfully transferred your 2015 IRS tax information.

Your IRS tax information has been successfully transferred into this FAFSA. Questions that were populated with tax information will be marked with "Transferred from the IRS."

Sign & Submit FAFSA

IMPORTANT:

Remember to enter SUBMIT MY FAFSA NOW after all the IRS Data has been transferred and saved



The screenshot shows the 'Sign With an FSA ID' section of the FAFSA application. It is divided into two parts: Parent Signature and Student Signature. Each part includes a 'READ BEFORE PROCEEDING' box with terms and conditions, a list of items to verify, and a 'SIGN' button. The Parent Signature section includes fields for Social Security Number, last name, and date of birth. The Student Signature section includes fields for FSA ID Username or Verified E-mail Address and FSA ID Password. At the bottom right, there are buttons for 'PREVIOUS' and 'SUBMIT MY FAFSA NOW'. A yellow arrow points from the text 'Remember to enter SUBMIT MY FAFSA NOW' to the 'SUBMIT MY FAFSA NOW' button.

Sign With an FSA ID

Parent Signature - Sign With an FSA ID

Mother's/Stepmother's Social Security Number
XXX-XX-0248

Mother's/Stepmother's last name
northern

Mother's/Stepmother's date of birth
05/17/1966

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential, YOU, THE PARENT, certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked:

1. to provide information that will verify the accuracy of your completed form
2. to provide U.S. or state income tax forms that you filed or are required to file.

You also certify that you understand that the Secretary of Education has the authority to verify information reported on your application with the Internal Revenue Service and other federal agencies.

I, the parent, agree to the terms outlined above.
 Agree Disagree

What is your (the Mother's/Stepmother's) FSA ID?
FSA ID Username or Verified E-mail Address
FSA ID Password

[Create an FSA ID](#)
[Forgot Username](#)
[Forgot Password](#)

SIGN

Student Signature - Sign With an FSA ID

READ BEFORE PROCEEDING

By signing this application electronically using your Federal Student Aid PIN, username and password, and/or any other credential, YOU, THE STUDENT, certify that you:

1. will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education,
2. are not in default on a federal student loan or have made satisfactory arrangements to repay it,
3. do not owe money back on a federal student grant or have made satisfactory arrangements to repay it,
4. will notify your school if you default on a federal student loan, and
5. will not receive a Federal Pell Grant from more than one school for the same

I, the student, agree to the terms outlined above.
 Agree Disagree

What is your (the student's) FSA ID?
FSA ID Username or Verified E-mail Address
FSA ID Password

[Create an FSA ID](#)

SIGN

[PREVIOUS](#) [SUBMIT MY FAFSA NOW](#)

Selected for Verification?

Use the IRS Data Retrieval Tool to upload tax information

- Recommended as a way of providing correct IRS data on FAFSA
- Use if estimated tax information was originally used on FAFSA but taxes have now been filed
- Student/Parent meets criteria for using the retrieval tool

Selected for Verification but IRS Data Retrieval Tool is not an option?

Order an IRS Tax Return Transcript

- Student/Parent does not meet criteria for using retrieval tool
 - Filed an amended 2015 Federal Tax Return
 - Not filing a 2015 Federal Tax Return
 - Filing status is Married Filing Separately
 - Filing status is Unmarried and both parents living together
 - Filing status is Head of Household and martial status is married
 - Filed a Foreign Tax Return
- Return Transcript may be ordered by Mail
- A copy of the tax return transcript must be submitted to the Financial Aid Office along with the Verification Worksheet
- Keep a copy of the tax return transcript for your records

IRS.gov

Ordering a Tax Return Transcript

•Go to: www.IRS.gov

•Select Get a Tax Transcript

The screenshot shows the IRS.gov homepage. At the top, there is the IRS logo, a search bar, and navigation links for Subscriptions, Language, and Information For... Below this is a horizontal menu with categories: Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, and for Tax Pros. A row of four buttons with images of people offers: 'File Your Tax Return', 'Get Your Refund Status', 'Pay Your Tax Bill', and 'IRS.gov En Español'. Below this are three main content columns: 'Forms and Pubs' (listing forms like 1040, 1040EZ, W-4, W-9, 1099-MISC, Pub 15, Pub 17, 8962, Tax Table, Find Forms, and More...), 'Hot Topics' (listing topics like Get Free Tax Preparation Help, Electronic Filing Options, Do You Need to File a Tax Return?, Earned Income Tax Credit, Affordable Care Act, and More...), and 'Tools' (listing Find Answers to Your Tax Questions, Request an Electronic Filing PIN, Download the IRS2Go Mobile App, Renew or Obtain a PTIN for 2016, and 'Get a Tax Transcript' which is circled in yellow). To the right of these columns is a 'Filing & Payment' section with logos for where's my refund?, freefile, IRS e-file, and EFTPS. Below the main content is a 'News' section with headlines like 'Update: IRS Systems are Operating', 'What to Expect for Refunds in 2016', 'Taxpayer Bill of Rights: #1, the Right to Be Informed', 'Earned Income Tax Credit (EITC)', and More... A central banner features a coin and the text 'FILING YOUR TAXES COSTS LESS THAN THIS' with 'IRS.gov/freefile' and 'freefile' logos. To the right of the banner are sections for 'IRS Free File', 'Free File 2016 updates', and 'E-file options'. At the bottom right is a 'Social Media' section with a video player and social media icons for YouTube, Facebook, Twitter, and LinkedIn.

Ordering a Tax Return Transcript

- MAIL

The screenshot shows the IRS.gov website interface. At the top, there are navigation links for Subscriptions, Language, and Information For... A search bar is present with the word 'Search' and an 'Advanced' link. Below the search bar is a horizontal menu with categories: Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, and for Tax Pros. On the left side, there is a vertical menu with categories: Employees, Self-Employed, International Taxpayers, Military, Parents, Seniors & Retirees, and Students. The main content area is titled 'Get Transcript' and includes a heart icon, a plus icon, and a print icon. Below the title, there are language options: Español, 中文, 한국어, Tiếng Việt, and Русский. The main text explains that users can get a transcript by mail to view tax account transactions or line-by-line tax return information for a specific tax year. It notes that the method used to file the return and whether there is a refund or balance due affects the current year transcript availability. A note states that if a copy of the return is needed, Form 4506, Request for Copy of Return, must be used. Below this, it specifies that to use 'Get Transcript by Mail', users need their Social Security number (SSN) or Individual Tax Identification Number (ITIN), date of birth, and address from their latest tax return. A blue button labeled 'Get Transcript by MAIL' with an envelope icon is highlighted with a yellow oval. Below the button, a list of links includes: 'Transcripts arrive in 5 to 10 calendar days at the address we have on file for you', 'Transcript Types available by mail', 'Frequently asked questions (FAQs)', and 'Get Transcript by Mail en Español'. On the right side, there are two red-bordered boxes: 'Related Forms' listing Form 4506, Form 4506-T, Form 4506T-EZ, and Formulario 4506T-EZ (SP); and 'Related Websites' listing Social Security Administration (SSA) - My Account and Free Application for Federal Student Aid (FAFSA). At the bottom right, it says 'Page Last Reviewed or Updated: 04-Feb-2016'.

Subscriptions Language Information For...
Search Advanced

Filing Payments Refunds Credits & Deductions News & Events Forms & Pubs Help & Resources for Tax Pros

Employees
Self-Employed
International Taxpayers
Military
Parents
Seniors & Retirees
Students

Get Transcript

Español | 中文 | 한국어 | Tiếng Việt | Русский

You can get a transcript by mail to view your tax account transactions or line-by-line tax return information for a specific tax year. The method you used to file your return and whether you have a refund or balance due, affects your [current year transcript availability](#). **Note:** If you need a copy of your return, you must use [Form 4506, Request for Copy of Return](#).

To use **Get Transcript by Mail**, you need your [Social Security number \(SSN\)](#) or your [Individual Tax Identification Number \(ITIN\)](#), date of birth, and address from your latest tax return.

Get Transcript by MAIL

- Transcripts arrive in 5 to 10 calendar days at the address we have on file for you
- [Transcript Types](#) available by mail
- [Frequently asked questions \(FAQs\)](#)
- [Get Transcript by Mail en Español](#)

Related Forms

- › Form 4506, Request for Copy of Tax Return
- › Form 4506-T, Request for Transcript of Tax Return
- › Form 4506T-EZ, Short Form Request for Individual Tax Return Transcript
- › Formulario 4506T-EZ (SP), Formulario Abreviado para la Solicitud de un Trasunto de la Declaración de Impuestos Personales

Related Websites

- › Social Security Administration (SSA) - My Account
- › Free Application for Federal Student Aid (FAFSA)

The IRS never sends email requesting that you obtain or access your transcripts. If you receive such an email, please forward it to our fraud group at phishing@irs.gov.

Page Last Reviewed or Updated: 04-Feb-2016

IRS.gov

- Enter tax filer information as it appears on Tax Return

- Select CONTINUE

IRS.gov [Contact Us](#) | [Exit](#)

Get Transcript [En Español](#) | [Privacy Notice](#)

All fields are required

Social Security Number (SSN) or [Individual Tax ID Number \(ITIN\)](#) [?](#)

- -

Date of Birth

Day Month

[Street Address](#) [?](#)

[ZIP or Postal Code](#) [?](#)

[IRS Privacy Policy](#)

IRS.gov

- The Type of Transcript should be Return Transcript
- Tax Year 2015
- Select CONTINUE

IRS.gov [Contact Us](#) | [Exit](#)

Get Transcript

[Type of Transcript](#) ⓘ

Return Transcript ▼

for [Tax Year](#) ⓘ

2015 ▼

[Continue](#)

[IRS Privacy Policy](#)

IRS.gov

- If both student and parents filed taxes, both transcripts can be requested here

- Select Request a different transcript

- Select Exit when done



The screenshot shows the IRS.gov website interface. At the top right, there are links for "Contact Us" and "Exit". The main heading is "Get Transcript". Below this, a confirmation message states: "We have accepted your request for a 2015 Return Transcript. Please allow 5-10 days to receive it. The transcript will be sent to the address we have on file for you." A second line of text says: "If you need more than one copy of your transcript you are allowed to make copies for your personal records." Below this text is a button labeled "Exit" and a button labeled "Request a different transcript". At the bottom of the page, there is a link for "IRS Privacy Policy".

Tax Transcripts

- Transcript/s will be mailed to student/parent within 5-10 days
- Once received, keep original and submit a copy to the Financial Aid Office

Internal Revenue Service United States Department of the Treasury	
This Product Contains Sensitive Taxpayer Data	
Tax Return Transcript	
SSN Provided: 000-00-0100	Request Date: 03-04-2009
Tax Period Ending: Dec. 31, 2008	Response Date: 03-04-2009
	Tracking Number: 100000070432
The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.	
SSN: 000-00-0100	SPOUSE SSN: 000-00-0200
NAME(S) SHOWN ON RETURN: JOHN DOE & JANE DEE	
ADDRESS: 300 ANYSTREET BLVD DALLAS, TX 77000-0000-000	
FILING STATUS:	Married Filing Joint
FORM NUMBER:	1040
CYCLE POSTED:	20091408
RECEIVED DATE:	Feb.15, 2009
REMITTANCE:	0.00
EXEMPTION NUMBER:	5
DEPENDENT 1 NAME CTRL:	ABGR
DEPENDENT 1 SSN:	000-00-0300
DEPENDENT 2 NAME CTRL:	ABGS
DEPENDENT 2 SSN:	000-00-0400
DEPENDENT 3 NAME CTRL:	ABGS
DEPENDENT 3 SSN:	000-00-0500
DEPENDENT 4 NAME CTRL:	
DEPENDENT 4 SSN:	
PREPARER SSN:	
PREPARER EIN:	
Income	
WAGES, SALARIES, TIPS, ETC:	\$ 67,000.00
TAXABLE INTEREST INCOME: SCH B:	\$ 0.00
TAX-EXEMPT INTEREST:	\$ 0.00
ORDINARY DIVIDEND INCOME: SCH B:	\$ 0.00
QUALIFIED DIVIDENDS:	\$ 0.00
REFUNDS OF STATE/LOCAL TAXES:	\$ 0.00
ALIMONY RECEIVED:	\$ 0.00
BUSINESS INCOME OR LOSS (Schedule C):	\$ 0.00
BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:	\$ 0.00
CAPITAL GAIN OR LOSS: (Schedule D):	\$ 0.00
CAPITAL GAINS OR LOSSES: SCH D PER COMPUTER:	\$ 0.00
OTHER GAINS OR LOSSES (Form 4797):	\$ 0.00
TOTAL IRA DISTRIBUTIONS:	\$ 0.00
TAXABLE IRA DISTRIBUTIONS:	\$ 0.00
TOTAL DEFERRED AND UNRECORDED:	\$ 0.00